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Note: where noted, features mentioned in this newsletter are available in V4.4 of sfPMS.

Next Free Client Webinar!



March 13, 1 PM EST

Allocations and Markups



Join us to learn how you can set up and use allocations and markups in your Change Order processing! To register, go to


<https://www.eventbrite.com/event/10574331109>

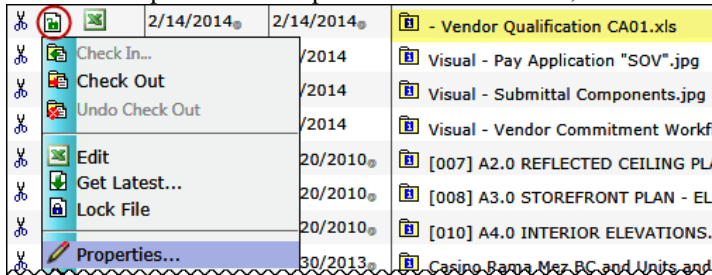
Register soon; tickets are limited! We had a great turnout last time, and you won't want to miss this one!

Spitfire Q & A: Removing Files from Folders

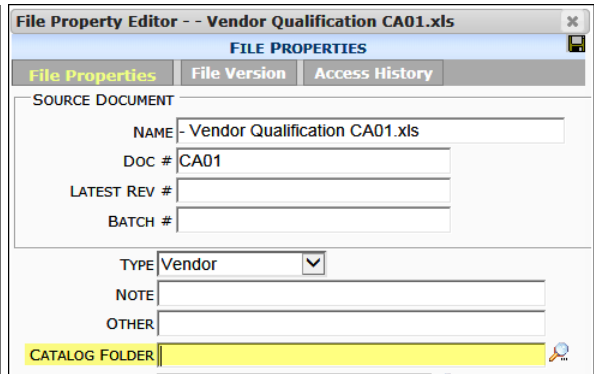
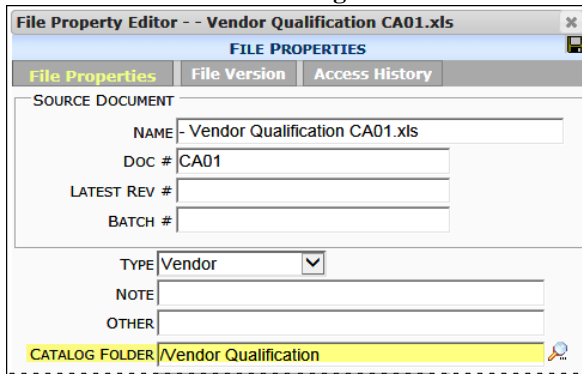
Q: I want to remove a file from its folder. I may want to move it to another folder at some point but right now I don't want it in any folder. How do I do that?



A: If you want to move a file from one folder to another, you can do so by clicking , then the new folder, then . However, if you want to remove the file from any folder you need to do the following:

1. Click  to open the Files Options menu for that file, then select **Properties**.



2. Delete the folder at the **Catalog Folder** field.



3. Click  to save then  to close the dialog box. Your file will no longer be in any user-defined folder. **Note:** the file will remain under in the root (all items), in the Files part of the Project Dashboard, and in the Catalog.

Spitfire Q&A: Projects on the Project List

Q: How do projects get added to my Project List?

A: There are a few ways that projects can be added to your Project List on your Home Dashboard:

| Select | Project Name | Location | Description | Start | Completion | Status | Schedule |
|--------|---|--|--|------------|------------|---------------|-------------------|
| | Northern Lights Plaza GC-003 | 84 Business Park Drive Armonk, NY 10504 (map) | This \$274 million mixed use plaza will contain retail shopping, office space, and food service establishments. REIT funding was | 12/10/2012 | 11/15/2013 | Concrete Work | On Schedule |
| | City Hall Renovation GC-006 | 121 N La Salle St Chicago, IL 60602 (map) | This set of existing buildings was renovated including seismic, mechanical, electrical and code up-grades including a new computer center. | 4/10/2012 | 11/30/2012 | Completion | On Schedule |
| | Fabrikam Manufacturing Facility GC-005 | 3500 Lemp Avenue St. Louis, MO 63118 (map) | Acme completed the build out of 32,000 SF of space containing 20,000 SF of raised floor with technology in floor and full height | 4/9/2012 | 2/25/2013 | Buildout | Ahead of Schedule |

- If you are added to the Team Contacts part on that project's Project Dashboard (for example, if you were added to GC-003's Team Contacts)
- If you are granted a role with a project-based condition that includes that project (for example, if you were given the Project Manager role for GC-006)
- If you create a new project through the - NEW PROJECT option (for example, if you were the one who created GC-005)

Once the project appears on your Project List, you can control whether the project is visible or not.

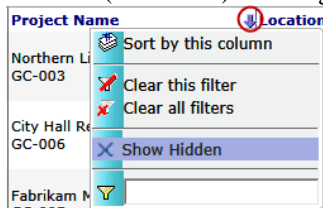
To hide or unhide a project:

1. Click to display both the filters and the **Show** column on the Project List part.

| PROJECT LIST | | | | | | |
|---|------------|------------|---------------|-------------|-------------------------------------|--------------------------------------|
| PROGRAM | | | | | | <input type="checkbox"/> SHOW HIDDEN |
| Description | Start | Completion | Status | Schedule | Show | |
| This \$274 million mixed use plaza will contain retail shopping, office space, and food service establishments. REIT funding was completed and commercial leases are now completed for 60% of available space | 12/10/2012 | 11/15/2013 | Concrete Work | On Schedule | <input checked="" type="checkbox"/> | |
| This set of existing buildings was renovated including seismic, mechanical, electrical and code up-grades including a new computer center building complete with a new emergency power service. Our services included hiring the architect and other design services, procuring permits and | 4/10/2012 | 11/30/2012 | Completion | On Schedule | <input checked="" type="checkbox"/> | |

2. Click to change it to if you want to hide a particular project. You can show that project again by clicking on the checkbox again.

Note: if want to keep a project hidden, you can still view it by either using the Show Hidden checkbox on the filters or (if on V4.4) selecting the Show Hidden option on the column drop-down menu.



You can decide if new projects should be automatically displayed in your Project List by selecting the **Show New Projects** option on your **Contact Details | Connections** tab. Otherwise, new projects will be on your list, but hidden by default.

Chris Demo

CONTACT DETAIL

| General | Address | Member Of | Connections | Notification | Alerts | Comments |
|------------------------|---------|-----------|-------------|---|--------|----------|
| PHONE (888) 287-4603 | | | | PREFERRED CONTACT NUMBER Cell | | |
| CELL (203) 952-6552 | | | | DEFAULT RESPONSIBILITY Project Manager | | |
| PAGER | | | | ROUTE VIA Web | | |
| FAX (888) 287-4603 | | | | ALLOW ROUTE ACTION PROXY Project Assistant | | |
| IM HANDLE | | | | IM SERVICE: Skype | | |
| ORGANIZATIONAL LEVEL 0 | | | | <input checked="" type="checkbox"/> SHOW NEW PROJECTS | | |

Feature Spotlight: Mobile Attach Via Email

A new feature in sfPMS V4.4 allows users to more easily attach files to a document when using Spitfire on a mobile device.

Setup

In order for this feature to work, some setup is necessary.



1. In **System Admin | Roles**, create a subrole with the Doc Type condition, for example:

| ROLE LIST | | | | |
|-----------|----------------------|--------------------|----------------------|----------------------------|
| ROLE LIKE | <input type="text"/> | TYPE | <input type="text"/> | |
| | Role Name | Description | Conditions | Conditions Optional |
| | Mechanical Sub | Mechanical Sub | ✓ x x x x | x |
| | Mobile Doc | Mobile Doc | ✓ x x x ✓ | <input type="checkbox"/> |

2. Add the **DOC | User Inbox Inbound Email Attachment Link** capability to that subrole.

| ROLE DETAIL | | | | |
|--------------|----------------------|--|---|--|
| Capabilities | | | | |
| MODULE | <input type="text"/> | CAPABILITIES | <input type="text"/> | |
| AREA | <input type="text"/> | | | |
| | Module | Role Capabilities | Permit (RIUDS) | Module Additional Capabilities |
| | DOC | User Inbox Inbound Email Attachment Link | <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | CSTM Customizable 1 |

3. Add the new subrole to a primary role and limit it by the Doc type(s) desired.

| ROLE LIST | | | | | | |
|-----------|----------------------|--------------------|----------------------|----------------------------|---------------|---------------------|
| ROLE LIKE | <input type="text"/> | TYPE | <input type="text"/> | | | |
| | Role Name | Description | Conditions | Conditions Optional | Active | Member Count |
| | Project Manager | Project Manager | ✓ x x x x | ✓ | ✓ | 6 |

| Included Sub Role(s) | | Available Sub Role(s) | |
|----------------------|-------------------------------|-----------------------|-----------------|
| | Mobile Doc Daily Field Report | | Doc Approver |
| | | | Doc Creator |
| | | | Doc Editor |
| | | | Doc Viewer |
| | | | DocItemsVisible |
| | | | Sub |
| | | 1 2 | |

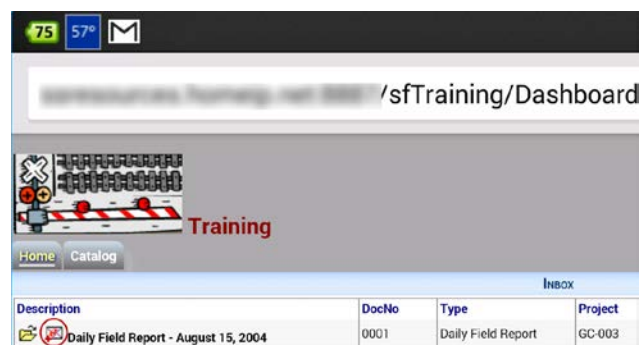
THE INCLUSION OF THIS ROLE IS LIMITED BY:

DOCUMENT TYPE

Users with that primary role will now see a new icon when documents of the specified Doc type are routed to them, and they open the Spitfire Inbox on a mobile device:

To attach a file to the document:

1. Click on the document row. You may be asked which email app you want to use to complete the action.
2. When the email opens, attach a file or photo to it as you would attach a file to any email.
Leave the To addressee and Subject line as is.
3. Send the email. The email will get processed by sfPMS and the attached file will appear on the document's Attachment tab.



Note: clicking on the icon does not open the document, nor route the document. Remember that once a file is attached to a document (even through a mobile device), that file is part of the project and appears in the Spitfire Catalog.

Have You Read?

The following focus guides and technical white papers have been written for V4.4 since February 1:

TWP: [Designing User Roles](#)

The following articles have been added to the Knowledgebase:

[KBA-01567](#): Using an IIS Farm

[KBA-01568](#): Allocation Example

[KBA-01569](#): Using SEQ to order the Doc Items Grid View

[KBA-01570](#): qAlias for Daily Field Reports



Contact Us

7 Skyline Drive, Suite 350
Hawthorne, NY 10532

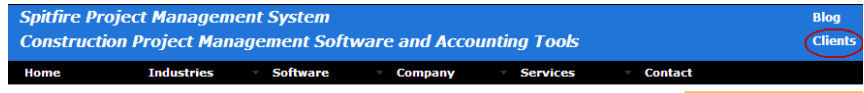
Phone: 888-287-4603
Fax: 888-287-4603

Support:
support@spitfiremanagement.com

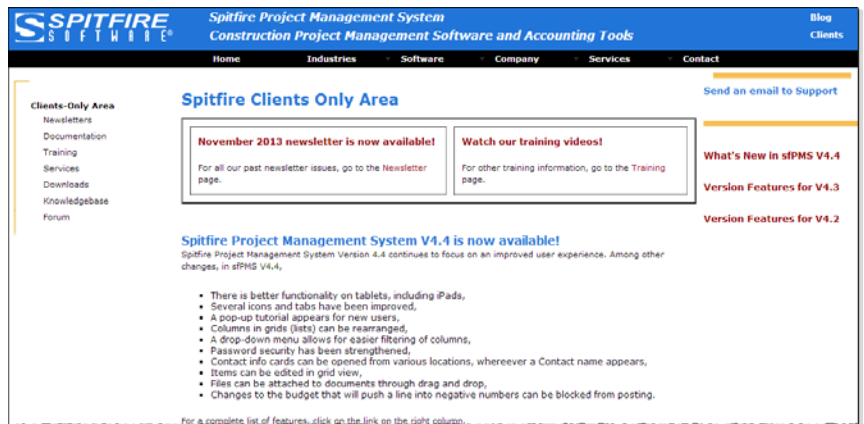
Training:
training@spitfiremanagement.com

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Your Clients Area



The [Clients area on our website](#) includes links to our [documentation](#), our [Knowledgebase](#), our [forum](#), our [downloads](#), and a list of what's new in versions [4.2](#), [4.3](#) and [4.4](#).



You will need your login and password to get to the Clients area. If you need or have forgotten your login and password, contact support@spitfiremanagement.com.

Training Classes and Videos

We offer live training classes by appointment for those who request them. Training class descriptions are available from the Clients area of our [website](#).

We also offer training videos from [the client area of our website](#) for those who want to review various topics.

Training Video Library

Aside from, and corresponding with, our live training, we offer a series of training videos that can be accessed 24/7. These videos are particularly useful for those who need to refresh their memory about a specific topic, or for new employees at companies that are already using the Spitfire Project Management System and who need general instruction before learning the specifics at their site.

There is no limit to how many people can access or view any video at one time, nor is there a limit to how many times any video can be viewed. Click on a header tab below to select a video in that series.

Basic Navigation Series [Foundation]

This series is a must for anyone who has not yet used or seen the Spitfire Project Management System (sfPMS).

- [101A - Basic Navigation Part 1](#), [5:08 min]
How to log in to Spitfire, change your password and access written documentation.
- [101B - Basic Navigation Part 2](#), [2:56 min]
An introduction to the Watchdog Alerts part of the Home Dashboard.
- [101C - Basic Navigation Part 3](#), [6:59 min]
An introduction to the Inbox and to Spitfire documents, and how to open a document and remove it from the Inbox.
- [101D - Basic Navigation Part 4](#), [9:21 min]
How to get to a Project Dashboard and create a new document. Also, an introduction to fields (look-ups, drop-downs and dates) and popEdit.
- [101E - Basic Navigation Part 5](#), [5:25 min]
An introduction to the Add Files tool and how to attach files to a document. Also, how to log out.
- [101F - Basic Navigation Part 6](#), [7:29 min]
How to create a new Project Setup document from the Home Dashboard and an introduction to the Addr, Dates and Items tabs.
- [101G - Basic Navigation Part 7](#), [7:14 min]
An introduction to the Team Contact part of the Project Dashboard including how to add new team members to the project.
- [101H - Basic Navigation Part 8](#), [7:11 min]
An introduction to the parts of the Project Dashboard: Conditions, Remarks, Photo, KPI, Cost Analysis Details and Files.

Documents, Items and Route Series [Foundation]